



▶ User's Guide for Polycom[®] HDX[®]
Desktop Systems

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User's Guide for Polycom® HDX® Desktop Systems

Version 3.0

This guide includes overview information that you might find helpful when you're just starting to learn about video conferencing or when you have experience, but you need a quick refresher.



Polycom® HDX® systems can be customized to show only those options used in your organization. Therefore, this guide might cover options that you cannot access on your system. To find out more about these options, please talk to the administrator of your Polycom HDX system.



This guide covers instructions for the Polycom HDX 4000 series.

Using the Polycom HDX 4000 Keypad

You use the keypad on the Polycom HDX 4000 series to place calls, adjust the volume, navigate screens, and select options.

You can access keypad help by pressing **Home** then **Info**.

Switch between computer desktop and video conference views

Cycle through display layouts

Navigate through menus

Zoom the camera in or out

Return to the previous screen

Place or answer a call; indicates call status

View or manage directory entries

Display the onscreen keyboard

Display menu of optional features

Delete letters or numbers

Press once for a dot, twice for a colon, three times for an asterisk

Start and stop showing computer desktop content to far sites

Access onscreen help; see system status in a call

Confirm your current selection; perform functions on highlighted items

Select the far-site or near-site camera to control

Return to the Home screen

End a call

Increase or decrease the sound you hear from the far sites and your computer

Enter letters or numbers; move the camera to a stored position

Mute the microphone audio you're sending to the far sites

Powering the System On and Off



Caution. In order to avoid corrupting the file system, always power off a Polycom HDX system using the power button on the system. After turning the power off in this way, wait at least 15 seconds before you unplug the system from its power source. This helps ensure that the system powers off correctly.

To power on the Polycom HDX 4000 series, do one of the following:

- Press the power button on the front of the system.
- Press the power button on the side of the monitor.

The system powers on and displays near video or your computer desktop within about 60 seconds.

To power off the Polycom HDX 4000 series monitor:

- >> Press the power button on the side of the monitor.

The monitor enters standby mode. The system stays powered on.

To power off the Polycom HDX 4000 series, do one of the following:

- Press and hold the power button on the side of the monitor.
The monitor and the system power off.
- Press and hold the power button on the front of the system.

The monitor and the system power off.

After turning the power off in this way, wait at least 15 seconds before you disconnect the system from its power source.

Calling and Answering

The  **Call** button lights to indicate call status.

- Blinking green light indicates an incoming call.
- Steady green light indicates a call in progress.
- Slow blinking green light indicates standby mode.

Answering a Call

The way a Polycom HDX system handles incoming calls depends on how it is configured. It either answers the call automatically, rejects the call automatically, or prompts you to answer the call manually.

To answer the call manually:

>> Press  Call or select **Yes** using the keypad.

Placing a Call

You can use your system to place a video call in any of these ways:

- Entering a name or number on the Place a Call screen.
- Choosing a site from:
 - Recent Calls list
 - Favorites screen
 - Speed Dial
 - Directory
- Calling into a scheduled meeting from the Calendar screen.


Calling by Entering a Name or Number

To place a call by entering a name or number:

- 1 From the Home screen select **Place a Call**, or start entering numbers with the keypad to go to the Place a Call screen if it is enabled on your system.
- 2 In the dialing field, enter the dialing information. Depending on the capabilities of your system and the system you are calling, the dialing information could look like one of these examples:
 - 10.11.12.13 (IP address – include the dots)
 - 2555 (E.164 extension for H.323 or SIP)
 - stereo.polycom.com (DNS name)
 - 19782922854 (ISDN or phone number)
 - user@domain.com (SIP)

To enter letters, press  **Keyboard** on the keypad.

To delete a number, press  **Delete** on the keypad.

- 3 Enter any additional information needed for the call. The available settings depend on the type of call and your system's configuration. Not all calls require these settings:
 - **Call Quality** – Specify the call rate or call type for this call. For most calls, choose Auto to let the system determine the best quality for the call. For audio-only calls, you might need to set this to **Phone**.
 - **Second ISDN number** – Use two numbers only when the person you are calling instructs you to do so.
 - **Extension** – If you need to dial an extension (E.164 address), enter the extension in the second entry field. If your system is not configured with a second entry field, you can enter the extension when the gateway prompts you. You can also specify characters in the dial string as instructed by the system administrator.
- 4 Press  **Call** on the keypad to place the call.


Call progress indicators appear on the HDX system monitor to show that the call is in progress. When the indicators turn green, the call is connected.

For more information about using the Place a Call screen, refer to [Types of Video Calls You Can Make](#) on page 7.


Calling from the Recent Calls List

If your system administrator has allowed access to Recent Calls, you can choose a number to call from a list of the sites you have called recently. The Recent Calls screen provides details of all incoming and outgoing calls, including the time of the calls.

To place a call from the Recent Calls screen:

- 1 Select **Recent Calls** from the Home screen.
- 2 Scroll to the entry you want to call and press  **Call**, or press the reference number that appears next to the entry to place the call.


You can filter the list by placed or received calls by selecting **Options > Sort Options**.

To see more details about a call listed on the Recent Calls screen, highlight the call and press  **Info** on the keypad.

Calling from the Favorites Screen

You might be able to see a list of Contacts on the Favorites screen.


To place a call from the Favorites screen:

- 1 Select **Favorites** from the Home screen.
- 2 Highlight the contact you want to call and press  **Call**, or press the reference number that appears next to the contact to place the call.
- 3 For more information about the Favorites screen, refer to [Working with Directory Entries and Favorites](#) on page 18.

Calling a Speed Dial Entry

Your system administrator might have configured Speed Dial buttons on the Home screen.

To place a call to a Speed Dial entry:



- 1 Highlight the speed dial entry you want to call on the Home screen.
- 2 Press  **Call** to place the call.

Contact your administrator for information about speed dial entries.

Calling from the Directory

The directory can include a list of sites stored locally on the Polycom HDX system. If the system is registered with a global directory, the directory includes entries from the global directory.

To place a call from the directory:

- 1 Press  **Directory** on the keypad.
- 2 Open a specific group folder to find the entry you want to call.
- 3 Highlight the entry to call.
- 4 Press  **Call** to place the call.




Depending on your system configuration, when you make a call using an entry with both ISDN and IP dialing information, the system might prompt you to choose which way to place the call.

For more information about using the directory, refer to [Working with Directory Entries and Favorites](#) on page 18.

Calling from the Calendar

If your HDX system is configured to connect to the Microsoft Exchange Server, and the Polycom Conferencing Add-In for Microsoft Outlook is installed at your site, you can join a scheduled meeting from the Calendar screen. If the Calendar screen is blank, the system is not connected to the Microsoft Exchange Server or no meetings are scheduled.


To join a scheduled meeting from the Calendar screen:

- 1 Go to the Calendar screen.
 - Select **Calendar** on the Home screen.
 - Select **System > Utilities > Calendar** from the Home screen.
 - Press the **Option** button on the keypad and select Calendar.
- 2 Find a meeting scheduled with the Polycom Conferencing Add-In for Microsoft Outlook, which is indicated with  on the Calendar screen.
- 3 Select **Join Now** to call into the meeting.

For more information about the Microsoft Exchange Server and the Polycom Conferencing Add-In for Microsoft Outlook, refer to [Using Polycom Conferencing for Microsoft Outlook](#) on page 33.

Ending a Call

To hang up from a call:

- 1 Press  **Hang Up** on the keypad
- 2 If prompted, confirm that you want to hang up.



In video calls, if you don't confirm that you want to hang up, the system disconnects the call automatically after 60 seconds.

In audio-only calls, if the person on the telephone hangs up first, you need to disconnect the Polycom HDX system from the call, just as you would hang up a telephone receiver in a regular phone call.

Types of Video Calls You Can Make

Depending on your system configuration, you might be able to make calls using ISDN, H.323, SIP, or V.35/RS-449/RS-530. You can place an audio-only call from Polycom HDX systems that have Analog Phone or Voice Over ISDN enabled.

The following table lists some possible call combinations.

From...	You can call...	By dialing...
ISDN	ISDN	Phone number
	IP	Phone number of the far-site gateway and the extension (E.164 address) of the far site. Enter the extension after the gateway number or wait until the gateway prompts you for the extension.
LAN	Networked and Public Sites	SIP URI, E.164 address, DNS name, or IP address.
	Protected and Private Sites	Typically, the far site's gateway number then the number of the far-site system. Consult with the far site about the best method for placing the call.
	ISDN	Depending on the H.323 gatekeeper or SIP server, the access code of the near-site gateway, the speed code, and the ISDN number of the far site. Contact your system administrator for more information.



Points to note about special dialing scenarios:

- When you call an IP system through a gateway that requires an extension (E.164 address), enter the extension in the dialing field whenever possible. Check with your network administrator for the extension delimiter you need to enter into the dialing field. For example, some networks use ## to separate the extension from the IP address.
- When you include the extension, you are prompted to save both the number and the extension in the directory when the call ends. If you enter the extension after the gateway connects, you can save only the gateway number when the call ends.
- To place a call within your PBX system, enter the internal extension instead of the full number.
- If you need to insert a pause, add one comma in the dial string for each second you want the system to pause.

Participating in an Encrypted Call

If encryption is enabled on the system, a locked padlock icon appears on the monitor when a call is encrypted. If a call is unencrypted, an unlocked padlock appears on the monitor.

- If you are in a point-to-point call or a multipoint call hosted by another system, the padlock icon displays the state of your individual connection.
- If you are hosting a multipoint call, the padlock icon displays the combined state of all connections: encrypted if all connections in the call are encrypted, unencrypted if one or more connections in the call are not encrypted.

In one call, some connections might be encrypted while others are not. The padlock icon might not accurately indicate whether the call is encrypted if the call is cascaded or includes an audio-only endpoint. To avoid security risks, Polycom recommends that all participants communicate the state of their padlock icons verbally at the beginning of a call.


Using Your Polycom HDX 4000 Series as a Computer Monitor

You can save space in your office or conference room by also using the Polycom HDX 4000 series display as your computer monitor.

Check that the computer video is configured to use one of these supported resolutions and refresh rates:

Resolution	Refresh Rates (Hz)
VGA (640 x 480)	60, 72, 75, 85
SVGA (800 x 600)	60, 72, 75
XGA (1024 x 768)	60, 70, 75
HD 720p (1280 x 720)	50, 60
SXGA (1280 x 960)	60
SXGA (1280 x 1024)	60, 75
WSXGA+ (1680 x 1050) – Recommended for HDX 4000 systems with Hardware Version A	60
WSXGA+ (1600 x 900) – Recommended for HDX 4000 systems with Hardware Version C and HDX 4000 systems with Hardware Version A that have been upgraded to Monitor Hardware Version B	60

To use your Polycom HDX 4000 series system as a computer monitor:

- 1 Connect your computer to the Polycom HDX 4000 series system as shown on the setup sheet that came with the system.
- 2 Press  **View Computer** on the keypad to toggle between displaying content from the computer and showing video from the video conferencing system.

If your computer is a laptop, you might need to press certain function keys to send video out of the laptop's VGA port like you would when sending video to a projector.



If you use the Polycom HDX 4000 series display as your computer monitor, Polycom recommends that you set up the system so that calls must be answered manually. This ensures that callers do not unexpectedly see or hear you at your desk.

Controlling What You See

Selecting and Adjusting a Camera or Other Video Source





You can use the keypad to select and adjust the built-in camera or other near-site or far-site video sources. You might be able to adjust other far-site cameras that support pan, tilt, and zoom movement.




You can adjust the far-site camera only if it is configured at the far site to allow you to control it.

To select a near-site or far-site camera:

- >> If you are in a call, press  **Near** or  **Far** on the keypad to select either near-site or far-site control.

	<p>This onscreen icon indicates that you have selected the near-site camera. The  Near button on the keypad is lit.</p>
	<p>This onscreen icon indicates that you have selected a far-site camera or video source. The  Far button on the keypad is lit.</p>

To adjust a camera using the keypad:

- 1 Select either a near-site or far-site video source to control. During a multipoint call being hosted by a system in the call, you can only adjust a camera at the far site that is currently speaking.
- 2 Press the arrow buttons on the keypad to move the camera up, down, left, or right.
- 3 Press  **Zoom** on the keypad to zoom out or in.

To open or close the privacy shutter:

- >> Move the slider to the left to close the privacy shutter, or to the right to open it. You can still make and receive calls when the shutter is closed, but the people at the far site cannot see you.



The light next to the shutter indicates camera status.



- Solid green means you are in a call.
- Flashing green means you are in a call but the shutter is completely closed.
- Off means you are not in a call.

Setting and Using Camera Presets



Camera presets are stored camera positions that you can create ahead of time or during a call. You can create up to 100 preset camera positions (0-99) for the built-in camera. These presets remain in effect until you delete or change them.

If far-site camera control is allowed, you can create up to 16 presets (0-15) for the far-site camera. These presets are saved only for the duration of the call. You might also be able to use presets that were created at the far site to control the far-site camera.

To move the camera to a stored preset:

- 1 If a call is connected, press  **Near** or  **Far** on the keypad
- 2 Press a number on the keypad.

To store a preset:

- 1 If you are in a call, press  **Near** or  **Far** on the keypad.
- 2 With the camera in the desired position, press and hold a number to store the preset position. To store a double-digit preset, press the first digit quickly and hold the second number down. Any existing preset stored at the number you enter is replaced.

The system uses preset 0 as the default camera position.

To delete all presets:

- 1 If you are in a call, press  **Near** on the keypad.
- 2 Press and hold  **Delete** to delete all presets.



You cannot delete just one preset. Instead, overwrite an existing preset with the new camera position.

Switching Between Full-Screen Video and the Home Screen

When the call connects, the system automatically shows video on the whole screen. You can switch back to the home screen during a call if, for example, you need to adjust a user setting, and your system is configured to allow you to do so.

To see video in the full screen:

>> Press  **Near** on the keypad.

To see the Home screen:

>> Press  **Home** on the keypad.

Changing the Layout during a Video Call


When the call connects, the system might show your computer desktop if a computer is connected. The far and near video might remain in a smaller window.


To switch between the computer desktop and video:

>> Press  **View Computer** on the keypad.

The **View Computer** button is lit when you are viewing the computer desktop.

To change layouts during a call, do one of the following:

>> Press  **Layout** on the keypad.

During point-to-point calls without content, you can press the  **Layout** button to scroll through the following screen layouts:



1 Near and far sites, same size, side by side



2 Far site big, near site small




3 Near site big, far site small



4 Near site, full screen



5 Far site, full screen

During point-to-point calls with content, you can press the  **Layout** button to scroll through the following screen layouts:



1 Content big, far and near sites small



2 Content big, far site small



3 Content and far site same size

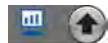


4 Content, full screen



Polycom HDX 4000 series systems with Hardware Version C show only two windows in Dual Monitor Emulation.

Far sites cannot see what is on your computer screen until you press the



Send Computer button.

Adjusting the Monitor Brightness

You can make the Polycom HDX 4000 series display brighter or dimmer using the + and - controls on the side of the monitor.







Controlling What You Hear

Adjusting Volume

You can raise or lower the volume of the meeting. Changing the volume affects only the sound you hear at your site.

To adjust the volume:


- Press  **Volume Down** or  **Volume Up** on the keypad repeatedly.
- Press and hold  **Volume Down** or  **Volume Up** on the keypad to quickly increase or decrease the near-site volume.

Muting the Microphone

You can mute the microphone if you do not want the far site to hear you.

To mute or unmute the microphone:

>> Press  **Mute** on the keypad.

If a Polycom microphone is connected to your system, you can also mute the call by pressing  on the microphone.

**Points to note about muting the microphone:**

- Muting the microphone mutes audio coming from auxiliary audio inputs on Polycom HDX 7000 series, Polycom HDX 8000 series, and Polycom HDX 9000 series.
- Muting the microphone does not mute audio coming from your computer.
- The microphone might automatically mute when the system is asleep or is waiting for you to log in.
- The microphone might automatically mute when the system automatically answers an incoming call.

Using a Headset or Desktop Speakers

You can connect headphones, a headset, or desktop speakers to the connectors on the side of the Polycom HDX 4000 monitor. The microphone input provides audio for video conferencing only; it does not provide input for other computer applications.



If you connect headphones, a headset, or desktop speakers, use a cable that is 10 ft (3 m) or shorter.

Showing Content

Depending on how your system is configured, you might be able to show content that is stored on a computer. When you show content from a computer, the far site can see you and what you see on the computer screen.

Showing Content from a Computer Connected Directly to the Polycom HDX System

If you have a computer connected to your Polycom HDX 4000 system, you can show your computer desktop (content) during a call. When you send content, the far site can see and hear you, and see and hear what is on your computer screen.

To start sending content:

>> Press the  **Send Computer** button on the keypad.

When you are sending content, the **Send Computer** button is lit.

To stop sending content:

>> Press the  **Send Computer** button on the keypad.

Showing Content with People+Content™ IP

People+Content™ IP allows you to send content from a computer that is not connected directly to the Polycom HDX system.




Points to note about People+Content IP:

- People+Content IP provides video-only content. No audio is shared.
- People+Content IP supports any computer desktop resolution with color set to 16-bit or higher.
- Your computer resolution can be set to anything, but People+Content IP scales the image to 1024x768 or 1280x720.
- The People+Content IP application must be installed on a computer.
- For a computer connected directly to the Polycom HDX system, Polycom recommends using the  **Send Computer** button instead of People+Content IP.


To install People+Content IP on a computer:

- 1 On a computer with a Microsoft® Windows XP, Windows Vista, or Windows 7 operating system, open a web browser and go to www.polycom.com/ppcip.
- 2 Download and install the People+Content IP software.

To start showing content:

- 1 On the computer, start the Polycom People+Content IP application.
- 2 Enter the IP address or host name of the Polycom HDX system and the meeting password, if one is set.
- 3 On the computer click **Connect**.
- 4 Open the content you want to show, and click  in People+Content IP.

To stop showing content:

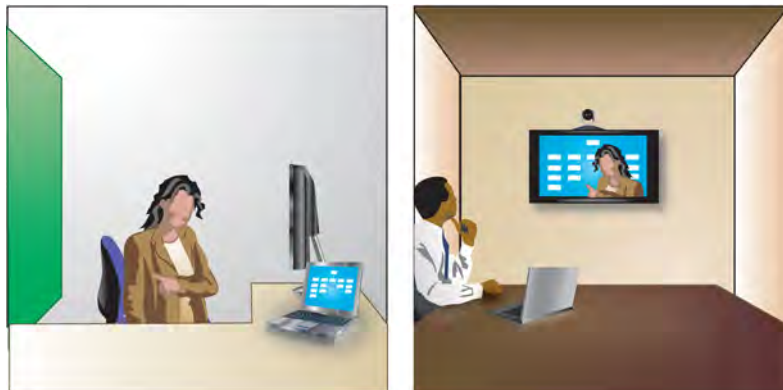
- 1 If the People+Content IP toolbar is minimized, maximize it by clicking the icon in the task bar.
- 2 Click  in People+Content IP.



To keep the call secure, content might be automatically stopped when a participant joins the call.

Showing Content with Polycom People on Content™

The Polycom People on Content™ option allows you to show yourself on top of content that you are sharing. The effect is similar to a weather newscast on television.




Contact your administrator for information about enabling or configuring People on Content.

Follow these guidelines when you are presenting content with People on Content:


- Wear solid neutral-colored clothes.
- Avoid wearing black, white, or the color of your background.

- Make sure that the room is well lit.
- Stay about 3 feet in front of the background to avoid casting shadows on it.

To show content with People on Content:

- 1 Make sure that the content you want to show is ready.
- 2 Press  **Option** on the keypad.
- 3 Select **People on Content**.

To stop showing content with People on Content:

- 1 Press  **Option** on the keypad.
- 2 Select **People on Content**.

Working with Directory Entries and Favorites

The directory on your Polycom HDX system stores dialing information that helps you make calls quickly and easily. When a site listed in the directory calls your system, the system displays the name on the screen when the call comes in. If a site that calls you is not listed in the directory, you might be prompted to save the contact information in the directory when the call ends.

If your system is registered with a global directory server, you can see information about other active sites that are registered with the same Global Directory Server. These entries are stored on the Global Directory Server, and you cannot edit them. You can, however, add a global entry to your Favorites.





For information about using a Microsoft Office Communications Server directory or managing Microsoft Office Communications Server contacts, refer to [Using Microsoft Office Communications Server Features with Video Calls](#) on page 34.



Sites that you have added are stored on your Polycom HDX system as Favorites. You can remove or edit Favorites. You can also assign Favorites to groups to more easily find them. Everyone at your site who uses the system can use the entries you create, and you can use the entries created by others. Users at other sites cannot access the Favorites on your system.

Polycom HDX systems support up to 1,000 Favorites. They can also support one of the following:

- Up to 200 additional Favorites with presence when registered with Microsoft Office Communications Server.
- Up to 200 additional Favorites with presence when registered with a Polycom Converged Management Application™ (CMA®) system.
- Up to 4,000 contacts from up to 5 servers, which appear in the Global Directory group, when registered with to Polycom GDS server.

Searching the Directory

- 1 Press  **Directory** on the keypad.
- 2 Open a specific group folder if you want to narrow your search results.
- 3 Enter a name in the search field by:
 - Spelling the name using the number buttons on the keypad
 - Spelling the name using the onscreen keyboard or by pressing  **Keyboard** on the keypad

Scroll through the list of names using the  **Up** and  **Down**


arrow buttons or  **Zoom** on the keypad.

- 4 If the search does not start as soon as you enter a character in the search field, select the  **Search** button.

Adding, Editing, and Deleting Favorites

You can create Contacts and groups and save them in the Polycom HDX system directory. Any changes appear in Favorites.

To add a Contact to Favorites:

- 1 Press  **Directory** on the keypad.
- 2 If you have groups within Favorites, make sure that you have opened the group where you want the new Contact to appear. To open a group, select it. The name of the group that is open appears at the top of the screen – for example, **Directory - Favorites**.
- 3 Select **Options > Add a Contact**.
- 4 Select **Create Contact**.


5 Specify the following information:

Setting	Description
Name	Name that appears in the directory list and on incoming call messages.
Group	The group where the new Contact appears.
Call Type	Call type to use for calls to the site. Depends on the capabilities of your system. For more information about call types, refer to Types of Video Calls You Can Make on page 7.
Call Speed	Call speed to use for video calls to this site.
Number	Number to use for calling the site.
Extension	The system's extension (E.164 address).

- 6 Select **Update** to add each combination of call type and number that you want to store for the site. To remove the last call type added, select **Clear**.
- 7 Select **Save** to save the entry.


To edit an entry:

You can edit any contact that was created locally.

- 1 Press  **Directory** on the keypad.
- 2 Open the Favorites group that contains the contact you want to edit. To open a group, select it. The name of the group that is open appears at the top of the screen--for example, **Directory - Favorites**.
- 3 Highlight the contact you want to edit.
- 4 Select **Options > Edit Contact**. You cannot edit a global entry.
- 5 Edit the information as needed.
- 6 Select **Save** to save your changes.

To delete an entry:

You can delete any contact that was created locally.

- 1 Press  **Directory** on the keypad.
- 2 Open the Favorites group that contains the contact you want to delete. To open a group, select it. The name of the group that is open appears at the top of the screen--for example, **Directory - Favorites**.
- 3 Highlight the contact you want to delete.

- 4 Press  on the keypad or select **Options > Delete Contact**. If Delete Contact is not available, you highlighted a global directory entry, which cannot be deleted.



Points to note about deleting contacts:


- If the contact is a member of more than one group, deleting it simply removes it from the group you are viewing. If the contact was created locally and is not a member of any other group, deleting it completely removes it from your system.
- You cannot delete a contact that was found as a result of a directory search.
- You cannot delete default Contacts that come from the global directory server, except contacts stored with the Polycom CMA presence service.

To add existing contacts to Favorites from the Favorites screen:

You can add existing global or new entries to your Favorites.

- 1 Go to the Favorites screen.
- 2 Open the Favorites group to which you want to add contacts.
- 3 Select **Options > Add a Contact** to add contacts to the group.
- 4 Select **Add from Directory**.
- 5 Find the contact that you want to add and select it.

To add existing contacts to Favorites from the directory:

- 1 Press  **Directory** on the keypad.
- 2 Open the Favorites group to which you want to add contacts.
- 3 Select **Options > Add a Contact** to add contacts to the new group.

To add a contact to Favorites from the Recent Calls screen:

- 1 Go to the Recent Calls screen.
- 2 Highlight the entry.
- 3 Choose **Options > Add to Favorites**.

Directory Groups

Grouping contacts can make them easier to find. Polycom HDX systems support global groups and Favorites groups. Global directory entries are assigned to a global group by your system administrator. You cannot edit or delete global directory groups.

The Favorites group can have one level of subgroups inside of it. Any group that you create on the Favorites screen or Directory screen is automatically added as a subgroup under Favorites.

You can put the same contact in more than one group, and you can delete it from one group at a time. To move a contact from one group to another, you must delete it from the first group and add it to the second group.

Polycom HDX systems support up to 200 Favorites groups. If the system is connected to a global directory server, it can also support one of the following:


- Up to 64 additional groups from the Microsoft Office Communications Server directory, which appear in the Favorites group.
- Up to 200 additional distribution groups from a Polycom CMA system, which appear in the Global Directory group.




Points to note about groups:

- You cannot rename a group. To change the name of a group, delete and recreate it.
- When you place a call to a group, the system uses the call speed specified on the Preferred Speeds screen as the preferred call speed for placing calls.
- The Sample Sites group includes Loopback entries and various Polycom regional sites that you can use to place test calls.

To create a group in Favorites:

- 1 Press  **Directory** on the keypad.
- 2 Select **Options > New Group**.
- 3 Enter a name for the group.

To delete a group from Favorites:

- 1 From the Favorites or Directory screen, highlight the group name.
- 2 Press  on the keypad or select **Options > Delete Group**.



When you delete a group, all entries in that group are deleted. If you want to keep these entries, be sure to assign them to a new group before you delete the old group.

To view or call a group:

From the Favorites screen or Directory screen, highlight the group name, then do one of the following:

- To view the contacts inside the group, press the center **Select** button on the keypad.
- To place a call to the group, press the **Call** button on the keypad. Depending on how your system is configured, it attempts to call the group using a pre-defined list of call types. Contact your system administrator for more information.




You cannot call a group that contains another group, and you cannot call a group that exceeds your system's multipoint calling capability.

Refreshing Entries from the Polycom Global Directory Server

The global directory entries are periodically refreshed on systems registered to the Polycom Global Directory Server. You can also manually refresh the global directory entries on your system.




To manually refresh Polycom GDS entries:




- 1 Press  **Directory** on the keypad.
- 2 Select **Group > Polycom GDS**.
- 3 Select **Options > Refresh**.


Contacts with Presence

If your system is automatically provisioned and registered to a global directory server, your Favorites might include default LDAP group members and up to 200 global Contacts stored by the presence service.

If the system is registered with a global directory, you could see the following icons next to Contacts on the Favorites screen.

Icon	Presence	Description
	Available	The system is set to Available and is registered with a presence service.
	Do Not Disturb	<ul style="list-style-type: none"> • The system is set to Do Not Disturb and is registered with a presence service. or • The system is set to Available but is in a call and is not available to receive another call.
	In a Call	The system is set to Available and is registered with a presence service. It is in a call but is available to receive another call.

Icon	Presence	Description
	Unknown Presence	The presence state is unknown. The Contact was created locally or is not registered with a presence service.
	Idle	The system is a desktop client that is available but is currently idle.
	Offline	The system is powered off or is offline.

You can view Contact details in the system's local interface. Highlight the Contact and press . A dialog appears with the display name, address, call speed, and group.

Including Multiple Sites in Calls

Your system might be configured to participate in multipoint calls. During a multipoint call, multiple sites can see and hear each other. You can also share content in a multipoint call, just as you can in a point-to-point call.


You can host multipoint calls using a video conferencing system with multipoint capabilities, or you can use a bridge such as the Polycom RMX 1000, Polycom RMX 2000, or Polycom MGC™.

Placing a Multipoint Call



How you place a multipoint call depends on whether you're using a Polycom HDX system with multipoint capabilities or a bridge such as the Polycom RMX 1000, Polycom RMX 2000, or Polycom MGC. The number of sites allowed in the call is determined by the capabilities of the system or bridge hosting the call. The call can include any combination of IP H.323, SIP, ISDN, V.35/Serial, and audio-only endpoints. For more information about call types, refer to [Types of Video Calls You Can Make](#) on page 7.

- For calls hosted by a Polycom HDX system, you can define a group in the directory to call all of the sites at one time. Alternatively, you can place a call to the first site, and then add other sites after the first call connects. The other sites can call the Polycom HDX system to join the call.
- For calls hosted by a bridge, you might need to enter calling information about all of the sites before the call begins. Contact your system administrator for more information.

To place a multipoint call by adding sites to a call:

- 1 Call the first site.
- 2 When the call connects, press  **Call** on the keypad.
- 3 Place a call to the next site. For more information, refer to [Placing a Call](#) on page 3.
- 4 Repeat steps 2 and 3 until all sites are connected.

To place a multipoint call using a directory group:

- 1 Press  **Directory** on the keypad.
- 2 Highlight a group folder in the directory list.
- 3 Press  **Call** to place the call.

Depending on how your system is configured, it attempts to call the group using a pre-defined list of call types. Contact your system administrator for more information.



To place a cascaded multipoint call:

- 1 Call a group from the directory, or place calls one at a time to several other sites. For more information, refer to [Placing a Call](#) on page 3.
- 2 Ask each site to call additional sites.

Passwords for Multipoint Calls

You might be required to enter a meeting password to join a multipoint call. And you can require that far sites enter a meeting password, to prevent unauthorized participants from joining multipoint calls hosted by your HDX system.






If you need to generate touch tones (DTMF tones), press  on the keypad, or press  and choose **Touch Tones**. Then use the keypad number buttons.

To enter a meeting password:





- If a prompt appears on the screen, use the keypad or onscreen keyboard to enter the password.
- If you hear an audio prompt, use the keypad to generate DTMF tones.

To configure a meeting password:

- 1 Press  **Home** to switch to the home screen if a computer is connected.
- 2 Select **System** from the Home screen.
- 3 Select **User Settings** from the System screen.
- 4 Enter the password in the Meeting Password field in one of these ways:
 - Press the keypad number buttons, using the text-entry method commonly used with cell phones.
 - Press  **Keyboard** to use the onscreen keyboard to enter characters.
- 5 Press  **Home** to save your change and return to the Home screen.

Multipoint Viewing Modes

What you see during a multipoint call can vary depending on how the Polycom HDX system is configured, the number of sites participating, and whether content is shared. The multipoint viewing mode configured on the host system is the one used in the call. To find out more about these modes, please talk to the administrator of your Polycom HDX system. The following table describes the different multipoint viewing modes.

Setting	Description
Video images from multiple sites can be automatically combined on one monitor in a display known as <i>continuous presence</i> .	
Auto 	The view switches between continuous presence and full screen, depending on the interaction between the sites. If multiple sites are talking at the same time, continuous presence is used. If one site speaks uninterrupted for at least 15 seconds, that site appears in full screen on the monitor.
Discussion 	Multiple sites are displayed in continuous presence. The current speaker's image is highlighted.
Presentation 	The speaker sees continuous presence while the other sites see the speaker in full screen on the monitor.
Full Screen 	The site that is speaking is shown in full screen to all other sites. The current speaker sees the previous speaker.

Using Chair Control for Multipoint Calls

During some multipoint calls, you can use chair control to manage the video. In this type of call, the chair controller can choose the site whose video is sent to other sites in the conference. The chair controller can also disconnect a site or end the conference. Any participant can choose to view a specific site, request to be the broadcaster, or request to be chair controller.

Only one site at a time can be the chair controller. Before a site can become the controller, the site with control must give up control.

The type of host for the multipoint call and the systems in the call determine whether chair control is available.

Hosted by...	Allows chair control if...
Video Conferencing System	The call includes: <ul style="list-style-type: none"> • Polycom HDX systems, ViewStation® EX, ViewStation FX, VSX®, and VS4000™ systems connected by IP H.323, ISDN H.320, or both • Other systems connected by ISDN H.320 only
Bridge	Allowed by the bridge

To use the chair control options when you are in a multipoint call:

- 1** On a computer, open Internet Explorer 6.x or later.
- 2** In the browser address line, enter the system's IP address, for example, <http://10.11.12.13>, to go to the video conferencing system's web interface.
- 3** Click **Place a Call**.
- 4** Click **Chair Control** to go to the Chair Control screen.



The Chair Control option is only available when the system is in a multipoint call. It is not available in cascaded multipoint calls.

- 5 Select a site from the list, and then use the controls in the web interface to perform one of these actions:

If you are...	You can do this...	By selecting...
Chair controller	Pass chair control to the selected sites.	Release Chair
	View the selected site's video. This remains in effect until you choose Stop Viewing Site or you release chair control.	View Site
	Return to viewing the video selected by the chair or by the host.	Stop Viewing Site
	Send your site's video to the other sites.	Make Me the Broadcaster
	Send the selected site's video to the other sites.	Select Broadcaster
	Remove the selected site from the conference.	Disconnect Site
	Disconnect all sites and end the call.	End Conference
Participant	Request control of the conference.	Acquire Chair
	View the selected site's video. This does not change what other sites see.	View Site
	Return to viewing the video selected by the chair or the host.	Stop Viewing Site

Changing the Way Calls Are Answered

Temporarily Refusing Calls

If your system administrator has allowed access to the Availability Control, you can automatically refuse incoming calls if you do not wish to be disturbed. Callers get a message that the call was rejected, and you receive no notification about incoming calls. You can, however, make outgoing calls.

To temporarily refuse incoming calls:



>> On the Home screen, set the Availability Control to **Do Not Disturb**.

Answering Video Calls Automatically


If your system administrator has allowed access to user settings, you can specify whether to answer video calls automatically or to have the system announce incoming video calls and wait for you to answer manually.




If you have a Polycom HDX 4000 system that you are using as your computer monitor, Polycom recommends that you set up the system so that you have to answer calls manually.

Automatically answering calls is convenient, but it can create security issues. An unexpected caller could interrupt a meeting in progress or look at equipment and notes left in an empty room.

To automatically answer video calls:



- 1 Select **System** from the Home screen.
- 2 Select **User Settings** from the System screen.
- 3 If you want to automatically answer incoming point-to-point video calls, set **Auto Answer Point-to-Point Video** to **Yes**.
- 4 If you want to automatically answer incoming multipoint video calls, set **Auto Answer Multipoint Video** to **Yes**.
- 5 Press  **Home** to save your change and return to the Home screen.

Muting Automatically Answered Video Calls

If your system administrator has allowed access to user settings, you can choose whether to mute the audio when automatically answered video calls connect. This prevents callers from overhearing conversations or meetings. After the call connects, you can press  **Mute** on the keypad when you're ready to unmute the microphones.

Note that, if you enable this option during a call, the audio for the current meeting is not affected.




To mute automatically answered video calls:

- 1 Select **System** from the Home screen.
- 2 Select **User Settings** from the System screen.
- 3 Scroll to **Mute Auto Answer Calls** and press  on the keypad to enable the option.
- 4 Press  **Home** to save your change and return to the Home screen.

Logging In and Out


Depending on how your system is configured, you might have to log in when the system comes out of sleep mode.

To log in:

- 1 When the Login screen appears, press  **Keyboard** or use the number buttons on the keypad to enter the User ID.
- 2 Enter the account password. To enter numbers, use the number buttons on the keypad. To enter letters, press  **Keyboard** on the keypad.
- 3 Select  to log in.

Depending on how your system is configured, you might get locked out after a certain number of failed login attempts. Contact your system administrator for more information.

To log out:

- >> Press  **Option** on the keypad and select **Logout** to log out manually.

The system automatically logs out the current account when the system goes to sleep.

Using a Polycom SoundStation® IP 7000 Conference Phone with a Polycom HDX System


When you connect a Polycom SoundStation® IP 7000 conference phone to a Polycom HDX system, the conference phone becomes another interface to dial audio or video calls. The conference phone operates as a microphone, and as a speaker in audio-only calls.


For more information, refer to the SoundStation IP 7000 documentation available on the Polycom web site.

To answer a call using a connected SoundStation IP 7000 conference phone:

- >> Press the **Answer** soft key on the conference phone.

To place a point-to-point call using a connected SoundStation IP 7000 conference phone:

- 1 Press  on the conference phone and press the **Video** or **Phone** soft key.
- 2 On the conference phone keypad, enter one of these:
 - The IP address (for example, 10*11*12*13) of the site you want to call
 - The phone number (for example, 19784444321) of the site you want to call

To enter letters, press the **ABC** soft key. To enter a dot or @ symbol, press the **ABC** soft key then  key multiple times.


You can also place calls using the conference phone's directory or the redial key.

The indicators on the conference phone are green when the system is in a call and audio is not muted.

To place a multipoint call using a connected SoundStation IP 7000 conference phone:


- 1 Call the first site.
- 2 When the call connects, press the **Add Video** or **Add Phone** soft key on the conference phone.
- 3 Place a call to the next site.
- 4 Repeat steps 2 and 3 until all sites are connected.

To control volume in a call using a connected SoundStation IP 7000 conference phone:

- >> Press the  and  keys on the conference phone to adjust the volume of audio from the far site.

You can also adjust the volume using the volume buttons on the Polycom HDX system keypad.


To mute audio in a call using a connected SoundStation IP 7000 conference phone:

- >> Press the  **Mute** key on the conference phone.

You can also mute the audio using the mute button on the Polycom HDX system keypad or on a connected Polycom HDX microphone.

The indicators on the conference phone are red when your audio is muted. The near-site mute icon also appears on the monitor display.

To end a call using a connected SoundStation IP 7000 conference phone:

- Press  on the conference phone to hang up the call.
- Press the **More** softkey then the **Manage** softkey to hang up one connection in a multipoint call.

To start or stop showing content using a connected SoundStation IP 7000 conference phone:


- >> Press the **Content** soft key on the conference phone. Content plays from Camera 2 if that input is configured for Content.

Using Polycom Conferencing for Microsoft Outlook




If your system is configured to connect to the Microsoft Exchange Server, you see a list of the day's meetings on the Calendar screen. If your system is not configured to connect to the Microsoft Exchange Server, you see the standard month-view calendar.

To view the Polycom HDX system calendar, do one of the following:

- Select **Calendar** on the Home screen.
- Select **System > Utilities > Calendar** from the Home screen.
- Press the **Option** button on the keypad and select **Calendar**.

To view more information about a meeting on the calendar, highlight it and press  on the keypad. Depending on how your system is configured, private meeting details might not be visible, and you might see reminders displayed on the system a short time before each meeting.

If your system is configured to connect to the Microsoft Exchange Server, *and* the Polycom Conferencing Add-In for Microsoft Outlook is installed at your site, you have access to the following additional calendar features:

- Upcoming meetings scheduled with the Polycom Conferencing Add-In for Microsoft Outlook are indicated with  on the Polycom HDX system Calendar screen. Past meetings scheduled with the Polycom Conferencing Add-In for Microsoft Outlook are indicated by .
- To join a meeting scheduled with the Polycom Conferencing Add-In for Microsoft Outlook, you can select **Join Now** on the Polycom HDX system without knowing the dialing information.
- You can schedule a meeting using the Polycom Conferencing Add-In for Microsoft Outlook by clicking  **Schedule Polycom Conference** in the Microsoft Outlook toolbar.

Using Microsoft Office Communications Server Features with Video Calls

Depending on how your system is configured, you might be able to search a Microsoft Office Communications Server directory, view a list of Microsoft Office Communications Server contacts, see if the contacts are online, and call them without knowing or remembering their addresses.



Microsoft Office Communications Server directory searches only return an entry whose last name begins with your search string. First names beginning with the search string are not returned in the results.

Managing Contacts Using Office Communicator

Office Communicator contacts appear on the Polycom HDX system Favorites screen and in the Favorites group in the directory. To add or delete Office Communicator contacts on the Polycom HDX system, use the Office Communicator application. You can populate groups created locally on a Polycom HDX system with existing Office Communicator contacts, but those changes do not appear on any other device.

To manage your contacts using Office Communicator:

- 1 Log in to Office Communicator with the same user name and password specified in the SIP settings of your Polycom HDX system.
- 2 From Office Communicator you can:
 - Add and remove contacts
 - Add and remove groups
 - Move contacts from group to group






Changes made to contacts and groups using Office Communicator appear on the Polycom HDX system Favorites screen and in the Favorites group in the directory. Polycom HDX systems support up to 200 contacts and 64 groups from Office Communicator.



Polycom HDX systems do not support Office Communicator distribution list groups, which are created on the Microsoft Exchange Server and are typically used for sending email to a group of people.

Viewing Microsoft Office Communications Server Presence States

Polycom HDX systems and Office Communicator users in an integrated environment use the following presence icons to indicate presence states:

Icon	Presence State	Description
	Do Not Disturb	Indicates that the HDX system or Office Communicator user is set to Do Not Disturb.
	In a Call	Indicates that the HDX system or Office Communicator user is in one of the following states: <ul style="list-style-type: none"> • In a call • Accepting urgent interruptions only • Busy • Inactive • In a Conference • In a Meeting
	Available	Indicates that the HDX system or Office Communicator user is available.
	Offline	Indicates the HDX system or Office Communicator user is offline.
	Presence Unknown	Indicates that the presence state of the HDX system or Office Communicator user is unknown.

Polycom Solution Support

Polycom Implementation and Maintenance services provide support for Polycom solution components only. Additional services for supported third-party Unified Communications (UC) environments integrated with Polycom solutions are available from Polycom Global Services and its certified Partners. These additional services will help customers successfully design, deploy, optimize and manage Polycom visual communications within their UC environments. Professional Services for Microsoft Integration is mandatory for Polycom Conferencing for Microsoft Outlook and Microsoft Office Communications Server integrations. For additional information and details please see

http://www.polycom.com/services/professional_services/index.html or contact your local Polycom representative.

Using Avaya Network Features with Video Calls

Depending on how your system is configured, you might be able to use Avaya® telephony network features such as call forwarding, transferring calls, and adding additional sites in an audio-only conference.



To activate call forwarding:

- 1 Make sure that the Polycom system is not in a call.
- 2 From the Place a Call screen on the Polycom system, dial the Feature Access Code provided by the Avaya Communication Manager administrator, followed by the E.164 extension of the system to which you want to forward the calls. For example, dial *22016 if *2 is the Feature Access Code and 2016 is the system E.164.
- 3 Wait for confirmation beeps.



To deactivate call forwarding:


- 1 From the Polycom system Place a Call screen, dial the Feature Access Code provided by the Avaya Communication Manager administrator. For example, #2 if #2 is the Feature Access Code for disabling call forwarding.
- 2 Wait for confirmation beeps.

To transfer a call:

- 1 While in a call, press  on your Polycom system keypad to access the tone pad.
- 2 Press  **Select** to activate flash hook. The first far-site system is placed on hold.
- 3 Wait for a dial tone, and then dial the extension of the far-site system to which you want to transfer the call. The call connects both audio and video between the local system and the second far-site system. The first far-site system is still on hold.
- 4 Hang up the near-site system. The two far-site systems are now connected in a call with audio and video, if the capabilities are present.

To add a system to a call:

- 1 While in a call, press  on the Polycom system keypad to access the tone pad.
- 2 Press  **Select** to activate flash hook. The far-site system is put on hold.
- 3 Wait for a dial tone, and then dial the extension of the system that you want to add to the call.

- 4 Press  **Select** again. The call becomes an audio-only conference with all of the systems. If the system that dialed the flash hook hangs up, the other systems remain connected in a call with audio and video, if the capabilities are present.



Customizing Your Workspace

You can customize what you see on the screen, depending on how your system is configured.

Allowing the Far Site to Control Your Camera

If your system administrator has allowed access to user settings, you can allow the far site to control your camera. Far-site participants can also set and use presets for your camera, if their system supports this.

To allow the far site to control your camera:

- 1 Select **System** from the Home screen.
- 2 Select **User Settings** from the System screen.
- 3 Scroll to **Far Control of Near Camera** and press  to enable the option.
- 4 Press  **Home** to save your change and return to the Home screen.






Changing this setting takes effect immediately, even if a call is in progress.

Displaying the Far Site's Name When the Call Connects

If your system administrator has allowed access to user settings, you can specify whether to display the far site's name when the call connects and how long to leave the name on the screen.

To specify when to display the name of the far site:




- 1 Select **System** from the Home screen.
- 2 Select **User Settings** from the System screen.
- 3 Select  **Next** to see more settings.

- 4 Scroll to **Far Site Name Display Time**, press  on the keypad, and select to display the far site's name during the entire call, for a specified time, or not at all.
- 5 Press  **Home** to save your change and return to the Home screen.

Hearing Audio Confirmation When You Dial

If your system administrator has allowed access to user settings, you can set up the system to speak each number as you enter it in the dialing entry field on the Place a Call screen.

To enable audio confirmation:

- 1 Select **System** from the Home screen.
- 2 Select **User Settings** from the System screen.
- 3 Select  **Next** to see more settings.
- 4 Scroll to **Keypad Audio Confirmation** and press  on the keypad to enable the option.
- 5 Press  **Home** to save your change and return to the Home screen.


Adjusting for Room Lighting

If your system administrator has allowed access to user settings, you can use the backlight control to adjust the brightness of the video that the main camera sends to the Polycom HDX system. Adjusting this setting can be helpful when the room arrangement results in strong light coming from behind the people in the picture.



Because backlight controls adjust the built-in camera, these controls do not make content from a computer appear brighter.

To turn backlight compensation on:

- 1 Select **System** from the Home screen.
- 2 Select **User Settings** from the System screen.
- 3 Scroll to **Backlight Compensation** and press  on the keypad to enable the option.
- 4 Press **Home** to save your change and return to the Home screen.

For information about adjusting the brightness of the Polycom HDX 4000 monitor, refer to [Adjusting the Monitor Brightness](#) on page 14.